

Agilent SureCall 3.0

Installation Guide

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Notices

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In This Guide...

This *Installation Guide* provides instructions for installing SureCall 3.0.

1 Installation of SureCall 3.0 for Windows – Fresh Install Instructions

This chapter provides instructions for new SureCall users on how to install and get started using SureCall 3.0 on computers running the Windows 7 Enterprise or Windows 7 Professional operating system.

2 Installation of SureCall 3.0 for Windows – Software Upgrade Instructions

This chapter provides instructions for users of SureCall 2.0 or 2.1 who want to upgrade to SureCall 3.0 while retaining all records currently in their SureCall database. It also contains instructions on uninstalling SureCall. The instructions in this chapter are specific for Windows computers.

3 Installation of SureCall 3.0 for Macintosh – Fresh Install Instructions

This chapter shows you how to install and get started using SureCall 3.0 on computers running the Macintosh OS X Mountain Lion or Mavericks operating system.

4 Installation of SureCall 3.0 for Macintosh – Software Upgrade Instructions

This chapter provides instructions for Macintosh users of SureCall 2.0 or 2.1 who want to upgrade to SureCall 3.0 while retaining all records currently in their SureCall database. It also contains instructions on uninstalling SureCall. The instructions in this chapter are specific for Macintosh computers running the Macintosh OS X Mountain Lion operating system.

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This chapter provides instructions for new SureCall users on how to install and get started using SureCall 3.0 on computers running the Windows 7 Enterprise or Windows 7 Professional operating system.

For instructions on upgrading from a previous version of SureCall to SureCall 3.0, see Chapter 2, "Installation of SureCall 3.0 for Windows – Software Upgrade Instructions" on page 37.

For instructions on installing SureCall 3.0 on a Macintosh computer, see Chapter 3, "Installation of SureCall 3.0 for Macintosh – Fresh Install Instructions" on page 67.



1 Installation of SureCall 3.0 for Windows – Fresh Install Instructions Preparing for installation

Preparing for installation

Download the software and release notes

- 1 Go to <u>http://www.agilent.com/genomics/surecall_soft</u>.
- 2 Click Download Software.
- **3** Click the Download link for the Windows version of the software.
- **4** Select **Save File** to save the installer on your computer. (This file is a large file. Depending on your internet connection speed, the download can take a long time.)
- **5** Browse to a location where you want to save the installer program, and then click **Save**. (Do not start the installation at this time.)
- 6 Return to <u>http://www.agilent.com/genomics/surecall_soft</u>.
- 7 Click the Download link for the Release Notes.
- 8 Click Save As.
- **9** Browse to a location where you want to save the release notes.
- 10 Click Save.

NOTE

You will also need to download the installer for the sequence alignment tools from the http://www.agilent.com/genomics/surecall_soft website.. See "Installing Sequence Alignment Tools" on page 112 for instructions.

Check system requirements before you start

Check to make sure that your computer systems meet the following requirements. All client installations point to the computer on which the server software is installed. See Table 1 for minimum requirements. See Table 2 for recommended requirements.

Operating system	64-bit Windows 7 Enterprise or Windows 7 Professional Any program that enables you to open PDF files (for example, Adobe Reader)		
Programs			
Processor	> 2 GHz		
Working memory (RAM)	Without aligners installed: 8 GB With aligners installed: 12 GB		
Hard disk space	470 GB (20 GB for genome reference data and annotation data and 450 GB for your sequencing data)		
Display Resolution	1280 x 768 or higher		

Table 1 Minimum requirements for running SureCall on Windows computers

Table 2 Recommended requirements for running SureCall on Windows computers

Operating system	64-bit Windows 7 Enterprise or Windows 7 Professional Any program that enables you to open PDF files (for example, Adobe Reader)		
Programs			
Processor	> 3 GHz, 8-core		
Working memory (RAM)	Without aligners installed: 8 GB With aligners installed: 16 GB		
Hard disk space	470 GB (20 GB for genome reference data and annotation data and 450 GB for your sequencing data)		
Display Resolution	1280 x 768 or higher		

Set up permissions for installer and users

- Make sure that the user account used to install the SureCall 3.0 software has administrator permissions on the installation computer.
- Make sure that every user account running the SureCall 3.0 software has read/write permissions in the computer where the client software is installed. In addition, users must have read/write permissions in the installation folder of the computer where the database server is installed.

The way you set permissions varies between operating systems. Contact your network administrator for help in checking or changing user account permissions. If the correct user account permissions are not set correctly, the software will fail to install or run properly.

Adjust user account settings

Change the User Account Control settings from the default setting to "Never Notify."

- **1** Go to Control Panel.
- 2 Click User Accounts.
- 3 Click Change User Account Control setting.
- 4 Change the setting to "Never Notify" and click **OK**.
- **5** Restart the computer.

Installing a standalone version of SureCall 3.0 – Windows

SureCall consists of two parts: a PostgreSQL database server and the client software. This section includes detailed instructions and important notes for installing SureCall 3.0 as a standalone program (i.e. the SureCall client software and server software are on a single computer).

Once you have installed a standalone version of SureCall on one computer, you can install additional copies of the client software on client computers that have network access to the database computer. See "Installing SureCall 3.0 client on additional computers – Windows" on page 26.

NOTE

Only one copy of the server software is installed. To run the client software, the database server must be installed. The client is the program you run when you want to use SureCall. You can run the client program on the same computer as the server, or from any other computer with the client program installed. After installation, the database server software runs silently in the background and manages the shared database for all SureCall 3.0 users. All client computers must have network access to the server computer and users must have read/write permissions.

- 1 Log on to the computer where you want to install a standalone version of SureCall 3.0. Use an account that has administrator permissions.
- 2 Locate the installation program you downloaded in "Download the software and release notes" on page 8. Double-click the Agilent SureCall 3.0.XX.exe file to start the installation wizard.

InstallAnywhere
InstallAnywhere is preparing to install...
22%
Cancel
(C) 2012 Flexera Software LLC

The following message is displayed.



Installing a standalone version of SureCall 3.0 – Windows

The installation wizard starts.



Figure 2 Introduction screen for the installation wizard – Windows

- **3** Read the introductory information. Pay particular attention to the information on RAM and hard disk space requirements.
- 4 Click Next.

The License Agreement screen opens.

Installing a standalone version of SureCall 3.0 - Windows



Figure 3 License Agreement screen – Windows

5 Read the license agreement. Select **I accept the terms of the License Agreement** and then click **Next**. (Click **Previous** to review information in a previous section.)

The Choose Install Set screen opens.

Installing a standalone version of SureCall 3.0 - Windows



Figure 4 Choose Install Set screen – Windows

- **6** Click the icon next to **Standalone** to install both the database server and client software on this computer.
- 7 Click Next.

The following message box opens notifying you that the installation wizard could not detect an existing copy of the SureCall server on the local computer. Installing a standalone version of SureCall 3.0 – Windows





8 Click **Fresh Install** in the message box.

The Enter Administrator Details screen opens.

Silent SureCall 3.0.0.49	
	Enter Administrator details
 Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number Enter Administrator details Add Sure Call Users Configure Proxy Settings Data Download Option Choose Install Folder Pre-Installation Summary Install Complete 	Enter a user account for administration of SureCall. If your institution uses Windows domain accounts, enter DOMAINIuser_name. If you use local accounts, enter MACHINE_NAME\administrator. User Account: AGILENT\chuffman Add SureCall Users?
Cancel	Previous

Figure 6 Enter Administrator Details screen – Windows

Installing a standalone version of SureCall 3.0 – Windows

9 The domain and user name of the person currently logged on to the computer appear in the User Account field. If this account is not the administrator for the SureCall 3.0 software, type the correct user, using the one of the formats shown below.

For domain user: DOMAIN\username

For local machine: MACHINENAME\username

10 To set up additional SureCall users, mark the check box labeled **Add SureCall Users?**. In the Password field that appears, type the password for the SureCall administrator account.

If you do not want to set up new users at this time, proceed directly to step 16 on page 17. Note that administrators can set up new users from within SureCall once installation is complete (see "Adding users and assign roles" on page 31).

11 Click Next.

The Add SureCall Users screen opens.

Introduction License Agreement	Searc	h user				
Choose Install Set		No.	User Name	Login Name	Email ID	
🖉 Confirm		1	CHAD MIN	chadmin	chadmin@agilent.com	
🖉 Get Server Details		2	Service ADSMZ	adsmz	smz@agilent.com	
🕽 Enter Port Number		3	ALIN RITZMAN	aritzma	ritzman@agilent.com	
Denter Administrator details		4	MARTIN GARTNER	martgart	gartner@agilent.com	
Add SureCall Users		5	EBERHARD BEK	ebek	ebek@agilent.com	
Configure Proxy Settings		6	FRITZE FROM	fritze	fritze@agilent.com	
Data Download Option		7	FRAN WOLF	franwol	wolf@agilent.com	
Choose Install Folder		8	FRITZ OBREITER	fritz	fritz@agilent.com	
Choose Shortcut Folder		9	JEN HEIRD	jehein	heinje@agilent.com	
Pre-Installation Summary		10	GERD PAFFMAN	gpaffma	paffman@agilent.com	
) Installing		11	HELMUT BRAYR	helmut	helmut@agilent.com	
Install Complete		12	GESUT DOEN	gdoen	gesdoen@agilent.com	
, motan complete		13	HELGA HOFFMANN	hehoffma	helga_hoffmann@agilent.com	
		14	KEIKO FESSEN	fessen	keiko_fessenmayr@agilent	
		15	MICHAEL SCHNEIDER	mueschne	schneider@agilent.com	
		16	JUERGEN BAUMGAER	jbaumgae	baumgaertner@agilent.com	
		17	MICHAEL BECK	michbeck	beck@adilept.com	



12 The Add SureCall Users screen lists all of the users in the domain or on the local computer. Mark the check box next to the users that you want to add to SureCall.

To search for a user, type the user name into the search box at the top of the screen.

- 13 Click Next.
- **14** The Add SureCall Users screen advances to the step for configuring user roles.

🛎 Agilent SureCall 3.0.0.49					
				Add SureCal	Users
Introduction	Please configu	re roles of the selected u	isers		
🟈 License Agreement	No.	User Name	Login Name	Roles	
🕜 Choose Install Set	1		bdunctan	Technician -	
🕜 Confirm		HEATHER	nuuristan		_
🕜 Get Server Details	2	TRI	tdoan	Technician 👻	
🟈 Enter Port Number					
🥥 Enter Administrator details					
妾 Add SureCall Users					
O Configure Proxy Settings					
O Data Download Option					
Choose Install Folder					
Choose Shortcut Folder					
O Pre-Installation Summary					
O Installing					
O Install Complete					
					•
InstallAnwhere	,				
Canaal				Brovious	Nort
Cancer				Flewious	VEXI



15 For each user listed on the screen, select a role in the Roles drop-down list.

The options are Administrator, Scientist, and Technician. See the SureCall help system for a description of each role.

16 Click Next.

The Configure Proxy Settings screen opens.

Installing a standalone version of SureCall 3.0 – Windows

🕙 Agilent SureCall 3.0.0.49	
	Configure Proxy Settings
 Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number Enter Administrator details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Installing Install Complete 	If your institution requires the use of a proxy server for connection to the internet, enter the information here. Without this information, SureCall will not be able to download reference data or link your results to external data sources. Proxy Host:
InstallAnywhere	
Cancel	Previous

Figure 9 Configure Proxy Settings screen – Windows

- **17** If your institution requires you to connect to the internet through a proxy server, enter the information for the proxy server in the fields on the Configure Proxy Settings screen. Contact your network administrator to obtain the necessary information.
- 18 Click Next.

The Data Download Option screen opens.

Installing a standalone version of SureCall 3.0 - Windows

Silent SureCall 3.0.0.49	
	Data Download Option
 Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number Enter Administrator details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Pre-Installation Summary Installform. Install Complete 	By default, SureCall will download and install the required reference data from Agilent's cloud storage immediately after program installation is complete. If you wish to install the data from local storage, enter the location below. Provide Data Location Restore Default Choose
Cancel	Previous

Figure 10 Data Download Option screen – Windows

19 By default, SureCall will download and install the required reference and annotation data from Agilent Cloud storage immediately after you complete SureCall installation. If you prefer for SureCall to download and install the required data from a local storage folder or a storage folder saved to an external USB drive, enter the file path of that folder in the Provide Data Location field. You can type the file path directly into the field or click **Choose** to browse to the storage folder.

Leave the Provide Data Location field blank if you want SureCall to download the required data from Agilent Cloud storage.

NOTE If you received an external USB drive from Agilent containing the reference and annotation data, plug in the USB drive to your computer and enter the file path of the drive into the Provide Data Location field.

20 Click Next.

The Choose Install Folder screen opens.

Installing a standalone version of SureCall 3.0 – Windows

Silent SureCall 3.0.0.49	
	Choose Install Folder
 Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number Enter Administrator details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Install Complete 	Choose the folder where SureCall will be installed. Program Location C:\agilent\Agilent_SureCall_3.0.0.49 Restore Default Folder Choose
Cancel	Previous

Figure 11 Choose Install Folder screen – Windows

21 By default, the program is installed in:

C:\agilent_Agilent_SureCall_3.0.XX (where XX is the revision number). If you prefer to install the program in a different location, enter the file path of the desired folder into the provided field. You can type the file path directly into the field or click **Choose** to browse to the desired folder.

If you want to install SureCall in the default location, leave the default file path in the field.

NOTE The installation program folder must not be in the C:\Program Files folder due to permissions settings within Windows 7.

22 Click Next.

The Choose Shortcut Folder screen opens.

Installing a standalone version of SureCall 3.0 - Windows

Silent SureCall 3.0.0.49		
		Choose Shortcut Folder
 Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number Enter Administrator details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary 	Select locations for program sh In a new Program Group: In an existing Program Group: In the Start Menu On the Desktop In the Quick Launch Bar Other: Don't create icons	Aglent SureCall Accessories Choose
InstallAnywhere	Create Icons for All Users	Previous

Figure 12 Choose Shortcut Folder screen – Windows

23 By default, program icons are installed in the Agilent SureCall program group on your computer (where XX is the revision number). To select another location for the program icons, select the desired location (on the desktop, for example).

NOTE

If more than one user plans to use SureCall 3.0 on this computer, select **Create Icons for All Users**. Otherwise, other users do not see the program icons.

24 Click Next.

The Pre-Installation Summary screen opens.

Installing a standalone version of SureCall 3.0 – Windows



Figure 13 Pre-Installation Summary screen – Windows

25 Review the installation setup information. If you want to change any of the settings, click **Previous** and go back and change the settings. To start the installation, click **Install**.

The Installing Agilent SureCall screen opens and remains open until the installation is complete.

Installing a standalone version of SureCall 3.0 – Windows



Figure 14 Installing Agilent SureCall screen – Windows

When the SureCall installation is complete, the Install Complete screen opens.

Installing a standalone version of SureCall 3.0 – Windows



Figure 15 Install Complete screen – Windows

26 Click Done.

The Download window opens and the program begins downloading and installing the reference and annotation data from Agilent Cloud storage (or from the folder you designated in the Data Download Option screen).

Installing a standalone version of SureCall 3.0 – Windows

🔀 Download	
Downloading SureCall server data	
Connecting to server 22-Jan-2013 10:57:05 - Starting Download at Tue 22-Jan-2013 10:57:06 - Available disk space: 400 22-Jan-2013 10:57:06 - Approximately 20 GB of o 22-Jan-2013 10:57:07 - Downloaded: /GenomeRo 22-Jan-2013 10:57:07 - Downloaded: /GenomeRo	> Jan 22 10:57:05 PST 2013 GB lata is being transferred from the Amazon cloud an eferences/hg19/hg19/hg19.fasta.fai eferences/hg19/hg19/hg19.dict
<<	>
	Close

Figure 16 Download screen

During this process, the Download screen remains open and displays which files have been downloaded and installed. Your system needs to be connected to the internet until the process is complete.

NOTE

Depending on your internet connection, the download process can take anywhere from 15 minutes to 2 hours.

27 When the downloads are complete, click **Close** to close the Download dialog box.

If the download fails or does not complete, you can manually download the missing files from within SureCall. See "Checking the data download" on page 34.

1 Installation of SureCall 3.0 for Windows – Fresh Install Instructions Installing SureCall 3.0 client on additional computers – Windows

Installing SureCall 3.0 client on additional computers – Windows

To use other computers to run SureCall 3.0 client software (with a shared database), install the client software on each of the computers.

NOTE

Before installing SureCall 3.0 client, install a standalone version of SureCall 3.0 on the computer that will run the database software. See "Installing a standalone version of SureCall 3.0 – Windows" on page 11.

- 1 On each computer that you want to run the SureCall 3.0 program, run the installation wizard, as described in "Installing a standalone version of SureCall 3.0 Windows" on page 11.
- 2 When the Choose Install Set screen opens, select Client.



Figure 17 Choose Install Set screen – Select Client – Windows

3 Click Next.

The Get Server Details screen opens.

Installing SureCall 3.0 client on additional computers – Windows

Silent SureCall 3.0.0.49		
		Get Server Details
 Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number Enter Administrator details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Chose Shortcut Folder Pre-Installation Summary Installing Install Complete 	Enter the nam server is listen Server Name: Port:	e (or the IP address) of your SureCall server, and the IP port that the ning on. 2UA2330MHN 7000
InstallAnywhere		Previous

Figure 18 Get Server Details screen – Windows

- 4 In the Server Name field, type the assigned computer name or IP address of the computer where you installed the SureCall 3.0 database server. (To find the computer name of your current computer, click Start > Control Panel > System.)
- **5** Accept the default **Port**, unless your system administrator tells you otherwise.
- 6 Click Next.

The installer immediately tests the connection to the specified database.

NOTE If incorrect database parameters are provided, or the PostgreSQL database service is not running, a message is displayed. You can choose to continue the installation and change database connection parameters when launching the client software. However, Agilent recommends that you provide the correct database information during installation.

7 Continue the installation wizard. Follow the instructions for the installation wizard to enter administrator information, choose a

1 Installation of SureCall 3.0 for Windows – Fresh Install Instructions Installing SureCall 3.0 client on additional computers – Windows

shortcut location, and start the installation. For information, see step 9 through step 27 in the section "Installing a standalone version of SureCall 3.0 – Windows" on page 11.

Opening the SureCall 3.0 client software

After you install the SureCall database server and client programs as described in this manual, start the program.

1 Double-click the SureCall 3.0 icon, or select SureCall 3.0 from the Windows Start menu.

NOTE

How you start the program depends on the choice you made for Shortcut Folder during installation.

After you start the program, the Login screen opens. The name and domain for the administrator set during installation appear in the dialog box.





2 Type your user name and password into the fields. After the software is started, administrators can add additional users and assign their roles.

If you need to change the domain, expand the drop-down list next to **Domain** and select the correct domain.

Opening the SureCall 3.0 client software

3 Click OK.

After you log in for the first time, the following dialog box opens.

🔁 Enter License	×
Enter license information to begin using SureCall.	
Host Name = T7400	
Browse to your license file OR paste the license text in the area below	
]
<u> </u>	
Browse Request for license	OK Cancel

Figure 20 Enter License dialog box

4 If you do not already have the license file saved to your computer, click **Request for license** to open the Agilent website to the SureCall license request page. Complete the fields in the request form to obtain a SureCall software license.

The license is contained in a text file.

5 At the bottom of the dialog box, click **Browse**.

The Open dialog box opens.

6 Browse to the saved license file. Select the file and click **Open**.

The program loads the content of the file into the text area on the Enter License dialog box.

7 Click OK.

The SureCall program opens.

Adding users and assign roles

If multiple client users will be connecting to the same SureCall database, the administrator must add the users and assign user roles. The user role determines what capabilities the user has within SureCall. For information on what capabilities each user role has, see the SureCall help system.

- **1** Go to the User Accounts screen in SureCall.
 - **a** At the top of the program window, click **Admin**.
 - **b** On the left side of the screen, click **User Accounts**.
- 2 Click Add New User.

The Add New User dialog box opens.

- **3** If your computer is on a network, add the new user using the following instructions.
 - **a** In the Add New User field at the top of the dialog box, type the user name for the new user and click **Find**. The table in the dialog box lists the users on your network that match the user name you entered.
 - b Click the row in the table for the user you want to add and clickAdd User. A message box opens asking you to confirm that you want to add the user.
 - **c** Click **Yes** in the message box. A message box opens confirming that the user was successfully added. Click **OK**.
- **4** If your computer is a local machine with no Domain, add the new user using the following instructions.
 - **a** In the Add New User field at the top of the dialog box, type the computer name and user in the format machinename\username. (Do not click **Find**).
 - **b** Click **Add User**. A message box opens asking you to confirm that you want to add the user.
 - **c** Click **Yes** in the message box. A message box opens confirming that the user was successfully added. Click **OK**.
- **5** Click **Close** in the Add New User dialog box to close the dialog box.

The added user is now listed in the table on the User Accounts screen. By default, new users are assigned the role of Technician.

- **6** If desired, change the role of the new user.
 - a In the Action column of the table, click Edit.The Edit User Role dialog box opens.
 - **b** In the drop-down list next to **Role**, select the desired role for the user.

The options are Administrator, Scientist, and Technician. See the SureCall help system for a description of each role.

c Click Save.

The new role is saved and the Edit User Role dialog box closes.

Adding a SureDesign user name and password

Before other users can download a design file from SureDesign into SureCall, the administrator must add the SureDesign account information.

- **1** Go to the SureDesign Settings screen in SureCall.
 - **a** At the top of the program window, click **Admin**.
 - **b** On the left side of the screen, click **SureDesign Settings**.
- **2** Type the user name for the SureDesign account into the SureDesign Username field.

In SureDesign, the user name is the e-mail address of the user.

- **3** In the SureDesign Password field, type the password for the SureDesign account.
- 4 Click Apply.
- **5** Click **Test Connection**.

A message box opens notifying you if the connection test succeeded or failed.

If the connection test passes, you can download design files from SureDesign into SureCall using the tools on the Supporting Files screen.

If the connection test fails, go to the SureDesign website (www.agilent.com/genomics/suredesign) and try logging in. If the login fails, you can reset the password or register for a new account.

Checking the data download

Checking the data download

When you first installed SureCall, the program automatically downloaded the necessary reference and annotation files from Agilent Cloud storage or from a specified local folder or drive.

Before you start running analyses in SureCall, make sure that the program successfully completed the data download process.

- **1** Go to the Annotation Download screen in SureCall.
 - **a** At the top of the program window, click **Admin**.
 - **b** On the left side of the screen, click **Annotation Download**.
- 2 Click Refresh Annotation Status.
- 3 In the message box that opens, click Yes to continue.

The program obtains the status of the data file downloads and displays the statuses in a table on the Annotation Download screen.

- **4** Check the status of the downloads.
 - If all files were successfully downloaded. the top right corner of the screen displays the message "All data files downloaded successfully."
 - If some files were not successfully downloaded, click **Start Download**. The program will connect to the Agilent Cloud storage system, or the local folder or drive specified during SureCall installation, to download the missing files.

NOTE

The source location for the files is specified on the Admin > Annotation Download screen. By default, the source location is the Agilent Cloud system, or whichever local folder was specified during installation (see the Data Download Option installation screen, step 19). SureCall administrators can change the location from the Admin > Annotation Download screen.

Downloading Software Updates

When an update is available, a dialog box automatically displays upon opening SureCall.



Figure 21 Updates Available message box

To automatically download these software updates:

- **1** Mark the **Software update** check box in the Updates Available dialog box. This will enable the Download button.
- 2 Click the **Download** button.

The Confirm message box opens asking you to confirm that you want to start downloading software update files.

3 Click **OK** to start the download process.

A Progress Status message displays. The application is unavailable for use during the software update download.

- **4** Once the download is complete, a Download Successful message box opens, and counts down from 5 seconds to close the application. Skip the countdown by clicking **OK**.
- **5** A dialog box indicates that the application has been updated. Click **OK** to launch SureCall.
- **6** Upon logging in, a dialog box indicates that the Agilent SureCall application was upgraded successfully. Click **OK** to continue.

1 Installation of SureCall 3.0 for Windows – Fresh Install Instructions Downloading Software Updates


Upgrading a standalone version of SureCall 38 Upgrading SureCall on client computers 54 Uninstalling SureCall 62

This chapter provides instructions for users of SureCall 2.0 or 2.1 who want to upgrade to SureCall 3.0 while retaining all records currently in their SureCall database. It also contains instructions on uninstalling SureCall. The instructions in this chapter are specific for Windows computers.

If you want to upgrade from a previous version of SureCall to SureCall 3.0, but do not want to retain the records in your current database, first completely uninstall your existing version of SureCall (see "Uninstall the client and server software for SureCall" on page 62), then follow the instructions in Chapter 1, "Installation of SureCall 3.0 for Windows – Fresh Install Instructions" on page 37.

If you want to upgrade to SureCall 3.0 from a previous version on a Macintosh computer, then see Chapter 4, "Installation of SureCall 3.0 for Macintosh – Software Upgrade Instructions" on page 37.



Upgrading a standalone version of SureCall

Upgrading a standalone version of SureCall

These instructions are for users who are running an earlier standalone version of SureCall (i.e. the SureCall client software and server software are on a single computer) and want to upgrade to SureCall 3.0 while retaining the data in the existing database.

NOTE You can upgrade from SureCall 2.0 or SureCall 2.1 to SureCall 3.0 using the instructions provided here. If you are running SureCall 1.0 or 1.1, you must first upgrade to SureCall 2.0 before upgrading to SureCall 3.0.

NOTE

Reboot your computer just prior to starting these instructions.

- 1 Log on to the computer where you want to install a standalone version of SureCall 3.0. Use an account that has administrator permissions.
- **2** Double-click the **Agilent SureCall 3.0.XX.exe** file to start the installation wizard. (See "Download the software and release notes" on page 8 for instructions on downloading the SureCall 3.0 installation files.)

The following message is displayed.





The installation wizard starts.

Upgrading a standalone version of SureCall



Figure 23 Introduction screen for the installation wizard – Windows

- **3** Read the introductory information. Pay particular attention to the information on RAM and hard disk space requirements.
- 4 Click Next.

The following message is displayed, notifying you that a version of SureCall client already exists on the local machine.

Upgrading a standalone version of SureCall

Informatio	n 💌
	Agilent SureCall already exists. Installer cannot install Agilent SureCall 3.0 client software as another Agilent SureCall client software already exists on this machine. Uninstaller for existing Agilent SureCall will be launched. You need to uninstall existing Agilent SureCall client software to proceed for installing Agilent SureCall 3.0 client software. If you wish to keep using existing Agilent SureCall server, uninstall only Agilent SureCall client and select 'Standalone/Server Installation' option during Agilent SureCall 3.0 installation. Click OK to proceed with uninstalling the existing Agilent SureCall client. Else click Cancel to abort the installation.
	Cancel

Figure 24 Information box – Agilent SureCall already exists

5 Click **OK** to proceed with uninstalling the existing Agilent SureCall client.

The following message box opens, notifying you that Agilent recommends restarting your computer prior to uninstalling the SureCall client. (If you did not reboot your computer just prior to starting step 1, do so now, then start again at step 1.)



Figure 25 Alert message box

6 Click Continue to continue uninstalling SureCall.

The uninstaller program opens to the Introduction screen.

Upgrading a standalone version of SureCall

🔄 Uninstall Agilent SureCall 2.1.0.21	
	Uninstall Agilent SureCall 2.1.0.21
 → Introduction ○ Uninstalling ○ Uninstall Complete 	About to uninstall Agilent SureCall 2.1.0.21 InstallAnywhere will remove the features that were installed during product installation. Files and folders created after installation will not be removed.
InstallAnywhere Cancel	Previous



7 Click Uninstall to proceed.

The Uninstall Options windows opens.

Upgrading a standalone version of SureCall

🕙 Uninstall Agilent SureCall 2.1.0.21	
	Uninstall Options
Introduction Uninstalling	Select one of the following options:
O Uninstall Complete	Complete Uninstall Completely remove all components of Agilent SureCall 2.1.0.2.1. Database and all of its content will be removed. Files and folders created after the installation will not be affected.
	• Whinstall Specific Features Choose and remove specific components of Agilent SureCall 2.1.0.21. This is the option to select if you would like to keep the database and upgrade SureCall client software to a newer version.
InstallAnywhere	
Cancel	Previous Next



8 Select Uninstall specific features, and click Next.

The Choose Product Features screen opens.

Upgrading a standalone version of SureCall

🕙 Uninstall Agilent SureCall 2.1.0.21		×
	Choose Product Feat	ures
 → Introduction ○ Uninstalling ○ Uninstall Complete 	Check features that you want to uninstall. Unchecked features will remain installed.	•
		-
	Description	
	SureCall client application.	
InstallAnywhere		_
Cancel	Previous Unins	tall



9 In the top panel, mark the **Client** check box. Make sure that the Server check box is not marked.

10 Click Uninstall.

A message box opens asking you to confirm that you want to uninstall the SureCall client.

11 Click **Yes** in the message box to continue uninstalling.

The SureCall client is uninstalled. When the uninstallation is complete, the Uninstall Complete screen opens.

12 Click Done.

The uninstaller program closes and the SureCall 3.0 installation wizard opens to the License Agreement screen. You can now continue installing SureCall 3.0.

Upgrading a standalone version of SureCall



Figure 29 License Agreement screen – Windows

13 Read the license agreement. Select **I accept the terms of the License Agreement** and then click **Next**. (Click **Previous** to review information in a previous section.)

The Choose Install Set screen opens.

Upgrading a standalone version of SureCall



Figure 30 Choose Install Set screen – Windows

- **14** Click the icon next to **Standalone** to install both the SureCall 3.0 database server and client software on this computer.
- 15 Click Next.

The installation wizard looks for an existing version of SureCall server on your computer.

• If the installation wizard successfully finds the existing version of SureCall server, a message box opens stating Agilent SureCall server already exists on the local machine. Click **OK** in the message box to continue upgrading the existing SureCall server to the SureCall 3.0 server. The Configure Proxy Settings screen opens and you can proceed to step 16.

Upgrading a standalone version of SureCall

• If the installation wizard cannot find an existing version of SureCall server on your computer, a message box opens stating **Could not find Agilent SureCall server**. You can either click **Fresh Install** to install a fresh SureCall 3.0 server (no data in the existing database will be retained), or click **Upgrade** to provide a valid Agilent SureCall server installation path. When you continue with the wizard, the Configure Proxy Settings screen opens and you can proceed to step 16.

Silent SureCall 3.0.0.49	
	Configure Proxy Settings
Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number	nstitution requires the use of a proxy server for connection to the internet, enter rmation here. Without this information, SureCall will not be able to download se data or link your results to external data sources.
 Enter Administrator details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Install Complete 	ost:
InstallAnywhere Cancel	Previous

Figure 31 Configure Proxy Settings screen – Windows

- **16** If your institution requires you to connect to the internet through a proxy server, enter the information for the proxy server in the fields on the Configure Proxy Settings screen. Contact your network administrator to obtain the necessary information.
- 17 Click Next.

The Data Download Option screen opens.

Upgrading a standalone version of SureCall

Silent SureCall 3.0.0.49	
	Data Download Option
 Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number Enter Administrator details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Pre-Installation Summary Installform. Install Complete 	By default, SureCall will download and install the required reference data from Agilent's cloud storage immediately after program installation is complete. If you wish to install the data from local storage, enter the location below. Provide Data Location Restore Default Choose
Cancel	Previous Next

Figure 32 Data Download Option screen – Windows

18 By default, SureCall will download and install the required reference and annotation data from Agilent Cloud storage immediately after you complete SureCall installation. If you prefer for SureCall to download and install the required data from a local storage folder or a storage folder saved to an external USB drive, enter the file path of that folder in the Provide Data Location field. You can type the file path directly into the field or click **Choose** to browse to the storage folder.

Leave the Provide Data Location field blank if you want SureCall to download the required data from Agilent Cloud storage.

NOTE If you received an external USB drive from Agilent containing the reference and annotation data, plug in the USB drive to your computer and enter the file path of the drive into the Provide Data Location field.

19 Click Next.

The Choose Install Folder screen opens.

Upgrading a standalone version of SureCall

🛎 Agilent SureCall 3.0.0.49	
	Choose Install Folder
 Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number Enter Administrator details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Install Folder Pre-Installation Summary Installing Install Complete 	Choose the folder where SureCall will be installed. Program Location C:\agilent\Agilent_SureCall_3.0.0.49 Restore Default Folder Choose
Cancel	Previous

Figure 33 Choose Install Folder screen – Windows

20 By default, the program is installed in:

C:\agilent\Agilent_SureCall_3.0.XX (where XX is the revision number). If you prefer to install the program in a different location, enter the file path of the desired folder into the provided field. You can type the file path directly into the field or click **Choose** to browse to the desired folder.

If you want to install SureCall in the default location, leave the default file path in the field.

NOTE The installation program folder must not be in the C:\Program Files folder due to permissions settings within Windows 7.

21 Click Next.

The Choose Shortcut Folder screen opens.

Upgrading a standalone version of SureCall

Silent SureCall 3.0.0.49			x
		Choose Shortcut Fo	older
 Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number Enter Administrator details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Pre-Installation Summary Installing Install Complete 	Select locations for program sh In a new Program Group: In an existing Program Group: In the Start Menu On the Desktop In the Quick Launch Bar Other: Don't create icons	shortcuts Agilent SureCall Choose	
	Create Icons for All Users		
InstallAnywhere Cancel		Previous Nex	đ

Figure 34 Choose Shortcut Folder screen – Windows

22 By default, program icons are installed in the Agilent SureCall program group on your computer (where XX is the revision number). To select another location for the program icons, select the desired location (on the desktop, for example).

NOTE

If more than one user plans to use SureCall 3.0 on this computer, select **Create Icons for All Users**. Otherwise, other users do not see the program icons.

23 Click Next.

The Pre-Installation Summary screen opens.

Upgrading a standalone version of SureCall



Figure 35 Pre-Installation Summary screen – Windows

24 Review the installation setup information. If you want to change any of the settings, click **Previous** and go back and change the settings. To start the installation, click **Install**.

The Installing Agilent SureCall 3.0.XX screen opens and remains open until the installation is complete.

Installation of SureCall 3.0 for Windows - Software Upgrade Instructions 2 Upgrading a standalone version of SureCall



Figure 36 Installing Agilent SureCall screen – Windows

When the SureCall installation is complete, the Install Complete screen opens.

Upgrading a standalone version of SureCall



Figure 37 Install Complete screen – Windows

25 Click Done.

The Download window opens and the program begins downloading and installing the reference and annotation data from Agilent Cloud storage (or from the folder you designated in the Data Download Option screen).

Upgrading a standalone version of SureCall

🔀 Download	
Downloading SureCall server data	
Connecting to server 22-Jan-2013 10:57:05 - Starting Download at Tue Jan 22 10:57:05 PST 2013 22-Jan-2013 10:57:06 - Available disk space: 400 GB 22-Jan-2013 10:57:06 - Approximately 20 GB of data is being transferred from 22-Jan-2013 10:57:07 - Downloaded: /GenomeReferences/hg19/hg19/hg19.fa 22-Jan-2013 10:57:07 - Downloaded: /GenomeReferences/hg19/hg19/hg19.d	n the Amazon cloud an ısta.fai ict
	>
	Close

Figure 38 Download screen

During this process, the Download screen remains open and displays which files have been downloaded and installed. Your system needs to be connected to the internet until the process is complete.

26 When the downloads are complete, click **Close** to close the Download dialog box.

If the download fails or does not complete, you can manually download the missing files from within SureCall. See "Checking the data download" on page 34.

Start the SureCall program, log in, and enter your license information. See "Opening the SureCall 3.0 client software" on page 29.

Upgrading SureCall on client computers

Upgrading SureCall on client computers

These instructions are for users who are running the SureCall client software only. Follow these steps to upgrade the client software to a new version.

NOTE Before upgrading to SureCall 3.0 on computers that are only running the client software, upgrade to SureCall 3.0 on the computer that will run the database software. See "Upgrading a standalone version of SureCall" on page 38.

NOTE

Reboot your computer just prior to starting these instructions.

1 Double-click the **Agilent SureCall 3.0.XX.exe** file to start the installation wizard.

The following message is displayed.



Figure 39 InstallAnywhere dialog box - preparing to install

The installation wizard starts.

Upgrading SureCall on client computers



Figure 40 Introduction screen for the installation wizard – Windows

- **2** Read the introductory information. Pay particular attention to the information on RAM and hard disk space requirements.
- 3 Click Next.

The following message is displayed, notifying you that a version of SureCall client already exists on the local machine.

Upgrading SureCall on client computers

Informatio	n 💌
	Agilent SureCall already exists. Installer cannot install Agilent SureCall 3.0 client software as another Agilent SureCall client software already exists on this machine. Uninstaller for existing Agilent SureCall will be launched. You need to uninstalle xisting Agilent SureCall client software to proceed for installing Agilent SureCall 3.0 client software. If you wish to keep using existing Agilent SureCall server, uninstall only Agilent SureCall client and select 'Standalone/Server Installation' option during Agilent SureCall 3.0 installation. Click OK to proceed with uninstalling the existing Agilent SureCall elient
	Else click Cancel to abort the installation.
	Cancel

Figure 41 Information box – Agilent SureCall already exists

4 Click **OK** to proceed with uninstalling the existing Agilent SureCall client.

The following message box opens, notifying you that Agilent recommends restarting your computer prior to uninstalling the SureCall client. If you did not reboot your computer just prior to starting step 1, do so now, then start again at step 1.



Figure 42 Alert message box

5 Click Continue to continue uninstalling SureCall.

The uninstaller program opens to the Introduction screen.

Upgrading SureCall on client computers

🔁 Uninstall Agilent SureCall 2.1.0.21	
	Uninstall Agilent SureCall 2.1.0.21
 → Introduction △ Uninstalling ○ Uninstall Complete 	About to uninstall Agilent SureCall 2.1.0.21 InstallAnywhere will remove the features that were installed during product installation. Files and folders created after installation will not be removed.
InstallAnywhere	Previous



6 Click Uninstall to proceed.

A message box opens asking you to confirm that you want to uninstall the SureCall client.

7 Click Yes in the message box to continue uninstalling.

The SureCall client is uninstalled. When the uninstallation is complete, the Uninstall Complete screen opens.

8 Click Done.

The uninstaller program closes and the SureCall 3.0 installation wizard opens to the License Agreement screen. You can now continue installing SureCall 3.0.

Upgrading SureCall on client computers



Figure 44 License Agreement screen – Windows

9 Read the license agreement. Select **I accept the terms of the License Agreement** and then click **Next**. (Click **Previous** to review information in a previous section.)

The Choose Install Set screen opens.

Upgrading SureCall on client computers



Figure 45 Choose Install Set screen – Select Client – Windows

10 On the Choose Install Set screen, select Client.

11 Click Next.

The Get Server Details screen opens.

Upgrading SureCall on client computers

🛎 Agilent SureCall 3.0.0.49		
		Get Server Details
 Introduction License Agreement Choose Install Set Confirm Get Server Details Enter Port Number Enter Administrator details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Pre-Installation Summary Installing Install Complete InstallAnywhere Cancel 	Enter the name (o server is listening Server Name: 20, Port: 70	A2330MHN
		Previous

Figure 46 Get Server Details screen – Windows

- 12 In the Server Name field, type the assigned computer name or IP address of the computer where you installed the SureCall 3.0 database server. (To find the computer name of your current computer, click Start > Control Panel > System.)
- **13** Accept the default **Port**, unless your system administrator tells you otherwise.

14 Click Next.

The installer immediately tests the connection to the specified database.

NOTE

If incorrect database parameters are provided, or the PostgreSQL database service is not running, a message is displayed. You can choose to continue the installation and change database connection parameters when launching the client software. However, Agilent recommends that you provide the correct database information during installation.

15 Continue the installation wizard. Follow the instructions for the installation wizard to configure the proxy settings, choose an install

Installation of SureCall 3.0 for Windows – Software Upgrade Instructions 2 Upgrading SureCall on client computers

folder, choose a shortcut location, and start the installation. For information, see step 16 through step 25 in the section "Upgrading a standalone version of SureCall" on page 38.

2 Installation of SureCall 3.0 for Windows – Software Upgrade Instructions **Uninstalling SureCall**

Uninstalling SureCall

This section provides instructions on uninstalling the SureCall software. On a computer in which a standalone copy of SureCall is installed, you can select to uninstall only the client software or both the client software and server software.

Uninstall the client and server software for SureCall

The Uninstall program for SureCall provides an easy way to remove the SureCall client, server, and PostgreSQL programs from your computer.

CAUTION

When you completely uninstall SureCall, the database, the data contained in the database, and the reference data, including the reference genome file, are all completely removed. Do not uninstall the entire program unless you have backed up your database or no longer wish to use it.

NOTE

Reboot your computer just prior to starting these instructions.

1 Start the Uninstall Agilent SureCall.exe file, located in the Uninstall Agilent SureCall folder of your program folder.

Depending on which version of SureCall you are uninstalling, the following message box may open, notifying you that Agilent recommends restarting your computer prior to uninstalling SureCall. If you see this message box, click Continue.





The uninstaller program starts.

- 2 Read the introductory information, and then click Next.
- **3** Read the warning information. You are cautioned not to stop the uninstaller once it has started to remove the programs. Click **Next**. The Uninstall Options screen opens.



Figure 48 Uninstall Options screen – Windows

4 Select Complete Uninstall and click Next.

In the Confirmation dialog box that opens, click Yes to continue.

5 When the uninstallation is complete, a message appears. Click Done.

The SureCall client program, server program and database, and PostgreSQL program were removed from your computer. Program folders and data folders (such as data output folders) created after installation are not removed.

2 Installation of SureCall 3.0 for Windows – Software Upgrade Instructions Uninstalling SureCall

Uninstall the SureCall client software only

NOTE

Reboot your computer just prior to starting these instructions.

1 Start the Uninstall Agilent SureCall.exe file, located in the Uninstall Agilent SureCall folder of your program folder.

Depending on which version of SureCall you are uninstalling, the following message box may open, notifying you that Agilent recommends restarting your computer prior to uninstalling SureCall. If you see this message box, click **Continue**.





The uninstaller program starts.

- 2 Read the introductory information, and then click Next.
- **3** Read the warning information. You are cautioned not to stop the uninstaller once it has started to remove the programs. Click **Next**.

The Uninstall Options screen opens.

Uninstalling SureCall





4 Select Uninstall Specific Features and click Next.

The Choose Product Features screen opens.

Uninstalling SureCall

Uninstall Agilent SureCall		Σ
	Choose Product Featur	e
 → Introduction → Uninstalling → Uninstall Complete 	Check features that you want to uninstall. Unchecked features will remain installed.	•
	d → Description	-
nstallAnywhere	SureCall client application.	

Figure 51 Choose Product Features screen - mark Client - Windows

5 In the Choose Product Features screen, mark Client. When the Client check box is selected, only the client program is removed from the computer. The client program folder and any data folders created after installation are not removed.

The Uninstall button becomes active.

CAUTION

Do not select **Server** unless you want to remove client and server software completely, including the database, from your computer.

6 Click Uninstall.

In the Confirmation dialog box that opens, click Yes to continue.

7 When the uninstallation has completed, click **Done**.



3

Installation of SureCall 3.0 for Macintosh – Fresh Install Instructions

Installing Java Standard Edition (Java SE) 68 To check which versions of Java are installed 68 To install Java SE 6 68 To install Java SE 8 69 Preparing for installation 71 Installing a standalone version of SureCall 3.0 – Macintosh 74 Opening the SureCall 3.0 client software 90 Adding a SureDesign user name and password 92 Checking the data download 93

This chapter shows you how to install and get started using SureCall 3.0 on computers running the Macintosh OS X Mountain Lion or Mavericks operating system.

For instructions on upgrading from a previous version of SureCall to SureCall 3.0, see Chapter 4, "Installation of SureCall 3.0 for Macintosh – Software Upgrade Instructions" on page 95.

For instructions on installing SureCall 3.0 on a Windows computer, see Chapter 1, "Installation of SureCall 3.0 for Windows – Fresh Install Instructions" on page 7.



3 Installation of SureCall 3.0 for Macintosh – Fresh Install Instructions

Installing Java Standard Edition (Java SE)

Installing Java Standard Edition (Java SE)

In order to install and run SureCall 3.0 on a Macintosh computer, the computer must have Java SE 6 and Java SE 8 installed (version 6 is needed for the SureCall installer and version 8 is needed for the SureCall program). Check your computer to see which versions of Java SE, if any, are installed (see "To check which versions of Java are installed" on page 68). If it does not have version 6 or version 8, follow the instructions in this section to install the missing version or versions. See "To install Java SE 6" on page 68 and "To install Java SE 8" on page 69.

To check which versions of Java are installed

- **1** Open the System Information.
 - **a** In the Applications folder, open the Utilities folder.
 - **b** Double-click the System Information icon.
- 2 Under Software, click Installations.

The screen displays the completed installations, including those for Java. Figure 52 shows the software names for Java SE 6 and Java SE 8 as displayed on the Software System Information screen.

	Software Name	Version	Source	Install Date
Java SE 6 —	Java for OS X 2014-001		Apple	6/10/15 12:15 PM
Java SE 8 —	JDK 8 Update 45		3rd Party	6/10/15 12:46 PM
	OS X	10.8.5 (12F45)	Apple	6/10/15 11:46 AM



To install Java SE 6

If your Macintosh computer does not already have Java SE 6 installed, you need to install it before you can install SureCall.

- 1 Launch an internet browser and go to the webpage: http://support.apple.com/kb/DL1572.
- 2 On the right side of the screen, click **Download**.

- **3** Download the Java SE 6 installer to the desired location on your computer.
- **4** When download is complete, launch the Java SE 6 installer and follow the prompts to install the software.

To install Java SE 8

If your Macintosh computer does not already have Java SE 8 installed, you need to install it before you can install SureCall.

- 1 Launch an internet browser and go to the webpage: http://www.oracle.com/technetwork/java/javase/downloads.
- 2 Click the Download button (Figure 53) that is above the header Java Platform (JDK) 8u45.



Java Platform (JDK) 8u45

Figure 53 Download button for Java Platform (JDK) 8u45

3 Under Java SE Development Kit 8u45, select Accept License Agreement. Then, click the download link for Mac OS X x64 in the table of products (circled in red in Figure 54).

File Size	Download
146.89 MB	jdk-8u45-linux-i586.rpm
166.88 MB	jdk-8u45-linux-i586.tar.gz
145.19 MB	jdk-8u45-linux-x64.rpm
165.24 MB	jdk-8u45-linux-x64 tar gz
221.98 MB	jdk-8u45-macosx-x64.dmg
131.73 MB	JdK-8u45-solaris-sparcv9.tar.Z
92.9 MB	jdk-8u45-solaris-sparcv9.tar.gz
139.51 MB	jdk-8u45-solaris-x64.tar.Z
95.88 MB	jdk-8u45-solaris-x64.tar.gz
175.98 MB	jdk-8u45-windows-i586.exe
180.44 MB	jdk-8u45-windows-x64.exe
	File Size 146.89 MB 166.88 MB 145.19 MB 165.24 MB 221.98 MB 92.9 MB 139.51 MB 95.88 MB 175.98 MB 180.44 MB

Figure 54 Table of Java SE 8 products

3 Installation of SureCall 3.0 for Macintosh – Fresh Install Instructions Installing Java Standard Edition (Java SE)

4 Download the Java SE 8 installer to the desired location on your computer.

5 When download is complete, launch the Java SE 8 installer and follow the prompts to install the software.

Preparing for installation

Download the software and release notes

- 1 Go to <u>http://www.agilent.com/genomics/surecall_soft</u>.
- 2 Click Download Software.
- **3** Click the Download link for the Macintosh version of the software.
- **4** Select **Save File** to save the installer zip folder to your computer. (This folder contains large files. Depending on your internet connection speed, the download can take a long time.)
- **5** Browse to a location where you want to save the installer zip folder, and then click **Save**. (Do not start the installation at this time.)
- 6 Return to <u>http://www.agilent.com/genomics/surecall_soft</u>.
- 7 Click the Download link for the Release Notes.
- 8 Click Save As.
- **9** Browse to a location where you want to save the release notes.
- 10 Click Save.

NOTE

You will also need to download the installer for the sequence alignment tools from the http://www.agilent.com/genomics/surecall_soft website. See "Installing Sequence Alignment Tools" on page 112 for instructions.

3 Installation of SureCall 3.0 for Macintosh – Fresh Install Instructions Preparing for installation

Check system requirements before you start

Check to make sure that your computer systems meet the following requirements. See Table 3 for minimum requirements. See Table 4 for recommended requirements.

Operating system	Macintosh OS X Mountain Lion or Macintosh OS X Mavericks			
Programs	Any program that enables you to open PDF files (for example, Adobe Reader) Java SE 6 and Java SE 8 (see "Installing Java Standard Edition (Java SE)" on page 68)			
Processor	> 2.0 GHz dual-core Intel Core i5			
Working memory (RAM)	Without aligners installed: 8 GB With aligners installed: 12 GB			
Hard disk space	500 GB (50 GB for genome reference data and annotation data and 450 GB for your sequencing data)			
Display Resolution	1280 x 768 or higher			

Table 3 Minimum requirements for running SureCall on Macintosh computers

Table 4 Recommended requirements for running SureCall on Macintosh computers

Operating system	Macintosh OS X Mountain Lion or Macintosh OS X Mavericks		
Programs	Any program that enables you to open PDF files (for example, Adobe Reader) Java SE 6 and Java SE 8 (see "Installing Java Standard Edition (Java SE)" on page 68)		
Processor	> 2.5 GHz dual-core Intel Core i7		
Working memory (RAM)	Without aligners installed: 8 GB With aligners installed: 16 GB		
Hard disk space	500 GB (50 GB for genome reference data and annotation data and 450 GB for your sequencing data)		
Display Resolution	1280 x 768 or higher		
Set up permissions for installer and users

• Make sure that the user account used to install the SureCall 3.0 software has administrator permissions on the installation computer.

The way you set permissions varies between operating systems. Contact your network administrator for help in checking or changing user account permissions. If the correct user account permissions are not set correctly, the software will fail to install or run properly. 3 Installation of SureCall 3.0 for Macintosh – Fresh Install Instructions Installing a standalone version of SureCall 3.0 – Macintosh

Installing a standalone version of SureCall 3.0 – Macintosh

SureCall consists of two parts: a PostgreSQL database server and the client software. To run SureCall on a Macintosh computer, you must install SureCall as a standalone program, which requires installing both the database server and client software on the same computer. The client is the program that your run when you want to use SureCall. The database server runs silently in the background. While the Windows version of SureCall allows you to install additional copies of the client software on client computers that have network access to the database computer, the Macintosh version does not support that setup.

This section includes detailed instructions and important notes for installing SureCall 3.0 as a standalone program.

- **1** Log on to the computer where you want to install SureCall 3.0. Use an account that has administrator permissions.
- 2 Locate the installation program you downloaded in Step 1, "Download the software and release notes" on page 71. Double-click the Agilent SureCall Edition 3.0.XX.zip folder to extract the installer.
- **3** Double-click the **Agilent SureCall Edition 3.0.XX** icon to start the installation wizard.

The Authentication screen opens.

Installing a standalone version of SureCall 3.0 - Macintosh

00	Agilent SureCall
	Authentication
	You need an Administrator password to install the software.
	Click the lock to make changes
Instell/Anywhere	

Authentication screen for the installation wizard - preparing to install Figure 55

- 4 Click directly on the lock icon near the bottom of the screen. A dialog box opens with fields for entering a Name and Password.
- **5** In the dialog box, type the Name and Password for a user with administrator rights to the computer, then click **OK**.

The installation wizard starts.

Installing a standalone version of SureCall 3.0 – Macintosh

000	Agilent SureCall 3.0.1.5
	Introduction
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Install Complete 	This installer will guide you through the installation of Agilent SureCall. It is strongly recommended that you close all programs before continuing with this installation. Note: - The sequence aligners in SureCall require 12 GB of RAM. If you do not have sufficient memory, SureCall may still be used with pre-aligned data. - SureCall requires approximately 20 GB of genomic reference data for alignment and for annotation of variant calls. Ensure that you have sufficient hard disk space before attempting to install SureCall.
Cancel	Previous

Figure 56 Introduction screen for the installation wizard – Macintosh

- **6** Read the introductory information. Pay particular attention to the information on RAM and hard disk space requirements.
- 7 Click Next.

The License Agreement screen opens.

Installing a standalone version of SureCall 3.0 - Macintosh

000	Agilent SureCall 3.0.1.5
	License Agreement
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details 	Installation and use of 'Agilent SureCall' requires acceptance of the following license agreement: AGILENT TECHNOLOGIES INC. SURECALL SOFTWARE LICENSE AGREEMENT ATTENTION: DOWNLOADING, COPYING, PUBLICLY DISTRIBUTING, OR USING THIS SOFTWARE IS SUBJECT TO THE AGREEMENT SET FORTH BELOW. TO DOWNLOAD, STORE, INSTALL, OR RUN THE SOFTWARE, YOU MUST FIRST AGREE TO AGILENTIS SOFTWARE LICENSE AGREEMENT BELOW. IF YOU HAVE READ, UNDERSTAND AND AGREE TO BE BOUND BY THE SOFTWARE LICENSE AGREEMENT BELOW, YOU SHOULD CLICK ON THE "AGREE" BOX AT THE BOTTOM OF THIS PAGE. THE SOFTWARE WILL THEN BE DOWNLOADED TO OF UNSTAILED ON YOUR COMPUTER
 Add Sdreetan Osers Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Installing Install Complete 	ID OR INSTALLED ON FOOR CONFOLR. IF YOU DO NOT AGREE TO BE BOUND BY THE SOFTWARE LICENSE AGREEMENT BELOW, YOU SHOULD CLICK ON THE "DO NOT AGREE" BOX AT THE BOTTOM OF THIS PAGE AND CANCEL THE DOWNLOAD OR INSTALLATION OF THE SOFTWARE. IF YOU HAVE PURCHASED THE SOFTWARE FROM AGILENT, YOU MAY RETURN THE SOFTWARE FOR A FULL REFUND, OR, IF THE SOFTWARE IS SUPPLIED AS PART OF ANOTHER PRODUCT, YOU MAY RETURN THE ENTIRE PRODUCT FOR A FULL REFUND. Operating System Software by Microsoft is licensed to you under the Microsoft I accept the terms of the License Agreement I do NOT accept the terms of the License Agreement
InstallAnywhere	Previous Next

Figure 57 License Agreement screen – Macintosh

8 Read the license agreement. Select I accept the terms of the License Agreement and then click Next. (Click Previous to review information in a previous section.)

The Choose Install Set screen opens.

Installing a standalone version of SureCall 3.0 – Macintosh

000	Agilent SureCall 3.0.1.5
	Choose Install Set
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Install Complete 	• Standalone Select this option if you will use SureCall as a standalone application. • Client Select this option if you will access and store your data on a server. You will be asked to provide the server IP address during the installation process.
Cancel	Previous Next

Figure 58 Choose Install Set screen – Macintosh

- **9** Click the icon next to **Standalone** to install both the database server and client software on this computer.
- 10 Click Next.

The Enter Domain Properties screen opens.

Installing a standalone version of SureCall 3.0 - Macintosh

0 0	Agilent SureCal	1 3.0.1.5
		Enter Domain Properties
Introduction		
License Agreement	Click on the check box if you	want to configure advanced domain properties for
Choose Install Set	you login user.	
Get Server Details		
🕢 Enter Port Number		
Ə Enter Domain Properties		
 Enter Administrator Details 	🔲 Configure Domain Proper	ties
O Add SureCall Users	User Domain:	
O Configure Proxy Settings		
O Data Download Option	User DNS Domain:	example.com
O Choose Install Folder	LDAP Server:	
O Choose Shortcut Folder		
Pre-Installation Summary	Global Catlog Server Po	rt: 3268
🔘 Installing		
 Install Complete 	LDAP Port:	389
InstallAnywhere		
Cancel		Previous Next

Figure 59 Enter Domain Properties screen – Macintosh

11 If only the administrator will be accessing SureCall from this computer, or if the computer is a local machine, click **Next**. The Enter Administrator Details screen opens, and you can proceed to step 12.

If the computer is on a domain, and more than one user plans to use SureCall on this computer, configure the domain properties using the instructions in the following substeps.

- a Mark Configure Domain Properties.
- **b** Using the domain properties for your system, complete the fields for User Domain, User DNS Domain, LDAP Server, Global Catalog Server Port, and LDAP Port.
- c Click Next.

The Enter Administrator Details screen opens.

Installing a standalone version of SureCall 3.0 – Macintosh

NOTE

If you see a warning message titled **Domain validation failed**, click **OK** in the massage box, and then click **Previous** in the installer to return to the Enter Domain Properties screen. Repeat step b above with the correct domain properties. Do not proceed with the installation until you enter the domain properties and do not receive the **Domain validation failed** warning message.

000	Agilent SureCall 3.0.1.5
	Enter Administrator Details
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Install Complete 	Enter a user account for administration of SureCall. If your institution uses Windows domain accounts, enter DOMAIN\user_name. If you use local accounts, enter MACHINE_NAME\administrator. In case of local user on mac - enter administrator User Account: Add SureCall Users
InstallAnywhere	Previous
cuncer	Trevious Trevious

Figure 60 Enter Administrator Details screen – Macintosh

12 In the User Account field, type the username of the person who will be the administrator for the SureCall software, using the format shown in the examples below.

For domain user: DOMAIN\username

For local machine: username

13 To set up additional SureCall users, mark the check box labeled Add SureCall Users. In the Password field that appears, type the password for the SureCall administrator account.

If you do not want to set up new users at this time, proceed directly to step 18 on page 82. Note that the administrator can set up new users from within SureCall once installation is complete.

NOTE

To set up SureCall users during installation, you need to have entered the domain properties back in step 11.

14 Click Next.

The Add SureCall Users screen opens.

000			Agilent SureCall 3	.0.1.5		
					Add SureCall U	sers
 Introduction License Agreement 	Searc	:h us	er			
Choose Install Set		No.	User Name	Login Name	Email ID	
Get Server Details		1		PersistentAdm	Administrator@agilent	
Enter Port Number		2	EX Postmaster	ExPostmaster	ExPostmaster@agilent	
Enter Domain Properties		3		Guest	Guest@agilent.com	
Enter Administrator		4	vobadm	vobadm	vobadm@agilent.com	
Details		5	IWAM RAJMACHI	IWAM_RAJMACHI	IWAM_RAJMACHI@agile	
→ Add SureCall Users		6	IWAM DRONAGIRI	IWAM_DRONAGIRI	IWAM_DRONAGIRI@agi	
Configure Proxy Settings		7	IWAM MERU	IWAM_MERU	IWAM_MERU@agilent.com	
O Data Download Option		8	IWAM PERSISTENT	IWAM_PERSISTEN	IWAM_PERSISTENT01@	
O Choose Install Folder		9	agtvobadm	agtvobadm	agtvobadm@agilent.com	
O Choose Shortcut Folder		10	Dhruva Ray	dhruva_ray	dhruva_ray@agilent.com	
Pre-Installation Summary		11	Roshi Thampi	roshi_thampi	roshi_thampi@agilent	
O Installing		12	Sonia Aradhye	sonia_aradhye	sonia_aradhye@agilent	
O Install Complete		13	Deodatta Deshpa	deodatta_deshpa	deodatta_deshpande@	
C manage standplate		14	Vijay Desai	vijay desai	vijay desai@agilent.com	
InstallAnywhere						
Conset					Durations Name	
Cancel					Previous Nex	

Figure 61 Add SureCall Users screen – Macintosh

15 The Add SureCall Users screen lists all of the users in the domain. Mark the check box next to the users that you want to add to the SureCall database.

To search for a user, type the user name into the search box at the top of the screen.

16 Click Next.

Installing a standalone version of SureCall 3.0 – Macintosh

The Add SureCall Users screen advances to the step for configuring user roles.

000		Agilent SureCall 3.0	0.1.5		
				Add Sur	eCall Users
Introduction	Please con	figure roles of the s	elected users		
License Agreement	No.	User Name	Login Name	Roles	
Choose Install Set	1	IWAM MERU	IWAM_MERU	Technician	\$
Get Server Details	2	IWAM PERSISTENT	WAM PERSISTEN	Technician	<u>+</u>
Enter Port Number	-		MAM_LERSISTER	reenneian	•
Enter Domain Properties					
Enter Administrator Details					
→ Add SureCall Users					
O Configure Proxy Settings					
O Data Download Option					
O Choose Install Folder					
O Choose Shortcut Folder					
O Pre-Installation Summary					
🔘 Installing					
🔘 Install Complete					
InstallAnywhere					
Cancel				Previous	Next

Figure 62 Add SureCall Users screen – Configure roles step – Macintosh

17 For each user listed on the screen, select a role in the Roles drop-down list. The default selection is *Technician*.

Administrators can also edit user roles from within SureCall once installation is complete.

18 Click Next.

The Configure Proxy Settings screen opens.

Installing a standalone version of SureCall 3.0 - Macintosh

00	Agrient Surecali 5.0.1.5
	Configure Proxy Settir
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Installing Install Complete 	If your institution requires the use of a proxy server for connection to the internet, enter the information here. Without this information, SureCall will not be able to download reference data or link your results to external data sources. Proxy Host:
stallAnywhere	
Cancel	Previous

Figure 63 Configure Proxy Settings screen – Macintosh

- **19** If your institution requires you to connect to the internet through a proxy server, enter the information for the proxy server in the fields on the Configure Proxy Settings screen. Contact your network administrator to obtain the necessary information.
- 20 Click Next.

The Data Download Option screen opens.

Installing a standalone version of SureCall 3.0 – Macintosh

00	Agilent SureCall 3.0.1.5
	Data Download Option
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Pre-Installation Summary Installing Install Complete 	By default, SureCall will download and install the required reference data from Agilent's cloud storage immediately after program installation is complete. If you wish to install the data from local storage, enter the location below. Provide Data Location Restore Default Choose
InstallAnywhere	
Cancel	Previous

Figure 64 Data Download Option screen – Macintosh

21 By default, SureCall will download and install the required reference and annotation data from Agilent Cloud storage immediately after you complete SureCall installation. If you prefer for SureCall to download and install the required data from a local storage folder or a storage folder saved to an external USB drive, enter the file path of that folder in the Provide Data Location field. You can type the file path directly into the field or click **Choose** to browse to the storage folder.

Leave the Provide Data Location field blank if you want SureCall to download the required data from Agilent Cloud storage.

NOTE If you received an external USB drive from Agilent containing the reference and annotation data, plug in the USB drive to your computer and enter the file path of the drive into the Provide Data Location field.

22 Click Next.

The Choose Install Folder screen opens.

Installing a standalone version of SureCall 3.0 – Macintosh

000	Agilent SureCall 3.0.1.5
	Choose Install Folder
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Install Complete 	Choose the folder where SureCall will be installed. Program Location inside "Agilent_SureCall_3.0.1.5" in the folder "Agilent" on the disk "Macintosh HD" Restore Default Folder Choose
Cancel	Previous Next

Figure 65 Choose Install Folder screen – Macintosh

- **23** By default, the program is installed in the Agilent SureCall Edition 3.0.XX folder (where XX is the revision number) in the Agilent folder on the Macintosh HD disk. Leave the default folder in place, or click **Choose** to select a new location where you want to install the SureCall program folder. Within this folder, one folder is created for the server software and one folder is created for the client software.
- 24 Click Next.

The Choose Alias Folder screen opens.

Installing a standalone version of SureCall 3.0 - Macintosh

000	Agilent SureCall 3.0.1.5		
		Choose A	lias Folder
Introduction	Select locations for aliases		
License Agreement	In the Dock		
Choose Install Set	0		
Get Server Details	 On the Desktop 		
Enter Port Number	🔘 In your home folder		
Enter Domain Properties			
 Enter Administrator Details 	Other: Choose		
Add SureCall Users			
Configure Proxy Settings	Oon't create aliases		
Ø Data Download Option			
Choose Install Folder			
➔ Choose Shortcut Folder			
O Pre-Installation Summary			
O Installing			
 Install Complete 			
InstallAnywhere			
Cancel		Previous	Next

Figure 66 Choose Alias Folder screen – Macintosh

25 By default, program icon is installed on the Desktop of your computer. To select another location for the program icon, select the desired location (In the Dock, for example) and then click Next.

The Pre-Installation Summary screen opens.

Installing a standalone version of SureCall 3.0 – Macintosh

000	Agilent SureCall 3.0.1.5
	Pre-Installation Summary
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Installing Install Complete 	Please Review the Following Before Continuing: Product Name: Agilent SureCall Install Folder: "Agilent_SureCall_3.0.1.5" in the folder "Agilent" on the disk "Macintosh HD" Disk Space Information (for Installation Target): Required: 373.88 MegaBytes Available: -0 MegaBytes
InstallAnywhere	Previous

Figure 67 Pre-Installation Summary screen – Macintosh

26 Review the installation setup information. If you want to change any of the settings, click **Previous** and go back and change the settings. To start the installation, click **Install**.

The Installing Agilent SureCall Edition 3.0.XX screen opens and remains open until the installation is complete.

Installing a standalone version of SureCall 3.0 – Macintosh



Figure 68 Installing Agilent SureCall screen – Macintosh

When the SureCall installation is complete, the Install Complete screen opens.

27 Click Done.

The Download window opens and the program begins downloading and installing the reference and annotation data from Agilent Cloud storage (or from the folder you designated in the Data Download Option screen).

Installing a standalone version of SureCall 3.0 – Macintosh

500	Down	load	
Downloading SureCall	server data		
onnecting to server			
3-Apr-2013 12:42:00 - Sta	rting Download at Wed Ap	or 03 12:42:00 PDT 2013	
3-Apr-2013 12:42:01 - Av	ilable disk space: 676 GB		
3-Apr-2013 12:42:01 - Ap	roximately 50 GB of data	is being transferred from t	he Amazon cloud an
3-Apr-2013 12:42:01 - Do	nloaded: /GenomeRefere	ences/hg19/hg19/hg19.dict	
03-Apr-2013 12:42:01 - Do	nloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	fai
03-Apr-2013 12:42:19 - Do	nloaded: /GenomeRefere	ences/hg19/hg19.genome	
03-Apr-2013 12:43:18 - Do	vnloaded: /GenomeRefere	ences/hg19/hg19/genes.txt	
03-Apr-2013 12:47:33 - Do	nloaded: DO_UN_COMPRE	SS_18@/GenomeReference	s/hg19/hg19/hg19.fa
03-Apr-2013 12:49:06 - Do	vnloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	.z08
03-Apr-2013 12:49:30 - Do	vnloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	.z15
03-Apr-2013 12:49:57 - Do	vnloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	.z12
03-Apr-2013 12:52:12 - Do	nloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	.z09
03-Apr-2013 12:52:20 - Do	nloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	.z18
03-Apr-2013 12:52:24 - Do	nloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	.z10
03-Apr-2013 12:52:27 - Do	nloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	.z07
03-Apr-2013 12:52:31 - Do	nloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	.z02
03-Apr-2013 12:52:31 - Do	nloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	.z03
03-Apr-2013 12:52:33 - Do	/nloaded: /GenomeRefere	ences/hg19/hg19/hg19.fasta	.z04
			>
			_
			Close

Figure 69 Download screen

During this process, the Download screen remains open and displays which files have been downloaded and installed. Your system needs to be connected to the internet until the process is complete.

NOTE

Depending on your internet connection, the download process can take anywhere from 15 minutes to 2 hours.

28 When the downloads are complete, click **Close** to close the Download dialog box.

If the download fails or does not complete, you can manually download the missing files from within SureCall. See "Checking the data download" on page 93.

3 Installation of SureCall 3.0 for Macintosh – Fresh Install Instructions Opening the SureCall 3.0 client software

Opening the SureCall 3.0 client software

After you install the SureCall database server and client program, start the program.

1 Double-click the SureCall 3.0 icon to open the program.

NOTE

How you start the program depends on the choice you made for the Alias or Install Folder during installation of the client software.

After you start the program, the Login screen opens. The name and domain for the administrator set during installation appears in the dialog box.



Figure 70 Login screen

- **2** Log in with your user name and password.
- **3** If you need to change the domain, expand the drop-down list next to **Domain** and select the correct domain.
- 4 Click OK.

After you log in for the first time, the Enter License dialog box opens.

5 If you do not already have the license file saved to your computer, click Request for license to open the Agilent website to the SureCall license request page. Complete the fields in the request form to obtain a SureCall software license.

The license is contained in a text file.

6 At the bottom of the dialog box, click **Browse**.

The Open dialog box opens.

7 Browse to the saved license file. Select the file and click **Open**.

The program loads the content of the file into the text area on the Enter License dialog box.

8 Click OK.

The SureCall program opens.

Adding a SureDesign user name and password

Adding a SureDesign user name and password

Before you can download a design file from SureDesign into SureCall, you must add the SureDesign account information.

- **1** Go to the SureDesign Settings screen in SureCall.
 - **a** At the top of the program window, click **Admin**.
 - **b** On the left side of the screen, click **SureDesign Settings**.
- **2** Type the user name for the SureDesign account into the SureDesign Username field.

In SureDesign, the user name is the e-mail address of the user.

- **3** In the SureDesign Password field, type the password for the SureDesign account.
- 4 Click Apply.
- 5 Click Test Connection.

A message box opens notifying you if the connection test succeeded or failed.

If the connection test passes, you can download design files from SureDesign into SureCall using the tools on the Supporting Files screen.

If the connection test fails, go to the SureDesign website (www.agilent.com/genomics/suredesign) and try logging in. If the login fails, you can reset the password or register for a new account.

Checking the data download

When you first installed SureCall, the program automatically downloaded the necessary reference and annotation files from Agilent Cloud storage or from a specified local folder or drive (see step 27 through step 28 on page 88.)

Before you start running analyses in SureCall, make sure that the program successfully completed the data download process.

- **1** Go to the Annotation Download screen in SureCall.
 - **a** At the top of the program window, click **Admin**.
 - **b** On the left side of the screen, click **Annotation Download**.
- 2 Click Refresh Annotation Status.
- **3** In the message box that opens, click **Yes** to continue.

The program obtains the status of the data file downloads and displays the statuses in a table on the Annotation Download screen.

- 4 Check the status of the downloads.
 - If all files were successfully downloaded. the top right corner of the screen displays the message "All data files downloaded successfully."
 - If some files were not successfully downloaded, click Start Download. The program will connect to the Agilent Cloud storage system, or the local folder or drive specified during SureCall installation, to download the missing files.

NOTE

The source location for the files is specified on the Admin > Annotation Download screen. By default, the source location is the Agilent Cloud system, or whichever local folder was specified during installation (see the Data Download Option installation screen, step 21). SureCall administrators can change the location from the Admin > Annotation Download screen.

3 Installation of SureCall 3.0 for Macintosh – Fresh Install Instructions Checking the data download



Upgrading a standalone version of SureCall – Macintosh 96 Uninstalling SureCall – Macintosh 107 Uninstall the client and server software for SureCall 107 Uninstall the SureCall client software only 108

This chapter provides instructions for Macintosh users of SureCall 2.0 or 2.1 who want to upgrade to SureCall 3.0 while retaining all records currently in their SureCall database. It also contains instructions on uninstalling SureCall. The instructions in this chapter are specific for Macintosh computers running the Macintosh OS X Mountain Lion operating system.

If you want to upgrade from a previous version of SureCall to SureCall 3.0, but do not want to retain the records in your current database, first completely uninstall your existing version of SureCall (see "Uninstall the client and server software for SureCall" on page 107), then follow the instructions in Chapter 3, "Installation of SureCall 3.0 for Macintosh – Fresh Install Instructions" on page 67.

If you want to upgrade to SureCall 3.0 from a previous version on a Windows computer, then see <u>Chapter 2</u>, "Installation of SureCall 3.0 for Windows – Software Upgrade Instructions" on page 37.



Upgrading a standalone version of SureCall – Macintosh

Upgrading a standalone version of SureCall – Macintosh

These instructions are for users who are running an earlier standalone version of SureCall (i.e. the SureCall client software and server software are on a single computer) and want to upgrade to SureCall 3.0 while retaining the data in the existing database.

NOTE You can upgrade from SureCall 2.0 or SureCall 2.1 to SureCall 3.0 using the instructions provided here. If you are running SureCall 1.0 or 1.1, you must first upgrade to SureCall 2.0 before upgrading to SureCall 3.0.

NOTE

Reboot your Macintosh computer just prior to starting these instructions.

- 1 Log on to the Macintosh computer where you want to upgrade to SureCall 3.0. Use an account that has administrator permissions.
- **2** If Java Standard Edition 8 is not installed on the computer, download and install it before proceeding with the upgrade. See "Installing Java Standard Edition (Java SE)" on page 68 for instructions.
- **3** Uninstall the SureCall client software for the existing version of SureCall. See "Uninstall the SureCall client software only" on page 108 for instructions.
- **4** When uninstallation of the client is complete, start the installation program for SureCall 3.0 that you downloaded from Agilent.
- **5** On the Authentication screen, click the lock icon and in the dialog box that opens, enter the Name and Password for a user with Administrator rights to the computer.
- 6 Read the Introduction and then click Next.
- 7 Select I accept the terms of the License Agreement and then click Next to accept the license agreement.
- 8 On the Choose Install Set screen opens, select **Standalone**.

Upgrading a standalone version of SureCall – Macintosh

00	Agilent SureCall 3.0.1.5
	Choose Install Set
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Install Complete 	• Standalone Select this option if you will use SureCall as a standalone application. • Client Select this option if you will access and store your data on a server. You will be asked to provide the server IP address during the installation process.
Cancel	Previous Next

Figure 71 Choose Install Set screen – Select Standalone – Macintosh

9 Click Next.

The installation wizard looks for an existing version of SureCall server on your computer. After finding the existing version of SureCall server, a message box opens stating Agilent SureCall server already exists on the local machine. Click OK in the message box to continue upgrading the existing SureCall server to the SureCall 3.0 server.

The Enter Domain Properties screen opens.

Upgrading a standalone version of SureCall – Macintosh

000	Agilent SureCal	3.0.1.5
		Enter Domain Properties
Introduction		
License Agreement	Click on the check box if you	want to configure advanced domain properties for
Choose Install Set	you login user.	
Get Server Details		
Senter Port Number		
Ə Enter Domain Properties		
O Enter Administrator Details	🗌 Configure Domain Proper	ties
O Add SureCall Users	User Domain:	
O Configure Proxy Settings		
O Data Download Option	User DNS Domain:	example.com
O Choose Install Folder	LDAP Server:	
O Choose Shortcut Folder		
Pre-Installation Summary	Global Catlog Server Po	rt: 3268
🔘 Installing		
 Install Complete 	LDAP Port:	389
InstallAnywhere		
Cancel		Previous Next

Figure 72 Enter Domain Properties screen – Macintosh

10 If only the administrator will be accessing SureCall from this computer, or if the computer is a local machine, click **Next**. The Enter Administrator Details screen opens, and you can proceed to step 11.

If the computer is on a domain, and more than one user plans to use SureCall on this computer, configure the domain properties using the instructions in the following substeps.

- a Mark Configure Domain Properties.
- **b** Using the domain properties for your system, complete the fields for User Domain, User DNS Domain, LDAP Server, Global Catalog Server Port, and LDAP Port.
- c Click Next.

The Enter Administrator Details screen opens.

NOTE

If you see a warning message titled **Domain validation failed**, click **OK** in the massage box, and then click **Previous** in the installer to return to the Enter Domain Properties screen. Repeat step b above with the correct domain properties. Do not proceed with the installation until you enter the domain properties and do not receive the **Domain validation failed** warning message.

00	Agilent SureCall 3.0.1.5
	Enter Administrator Details
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Installing Install Complete 	Enter a user account for administration of SureCall. If your institution uses Windows domain accounts, enter DOMAIN\user_name. If you use local accounts, enter MACHINE_NAME\administrator. In case of local user on mac - enter administrator User Account: Add SureCall Users
InstallAnywhere Cancel	Previous Next

Figure 73 Enter Administrator Details screen – Macintosh

11 In the User Account field, type the username of the person who will be the administrator for the SureCall software, using the format shown in the examples below.

For domain user: DOMAIN\username

For local machine: username

NOTE

When upgrading from a previous version of SureCall, do not mark the Add SureCall Users check box in the Enter Administrator Details screen. On Macintosh computers, that feature is only available during fresh installs of SureCall 3.0.

Upgrading a standalone version of SureCall – Macintosh

12 Click Next.

The Configure Proxy Settings screen opens.

0 0	Agilent SureCall 3.0.1.5
	Configure Proxy Settings
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Installing Install Complete 	If your institution requires the use of a proxy server for connection to the internet, enter the information here. Without this information, SureCall will not be able to download reference data or link your results to external data sources. Proxy Host:
InstallAnywhere	
Cancel	Previous

Figure 74 Configure Proxy Settings screen – Macintosh

- **13** If your institution requires you to connect to the internet through a proxy server, enter the information for the proxy server in the fields on the Configure Proxy Settings screen. Contact your network administrator to obtain the necessary information.
- 14 Click Next.

The Data Download Option screen opens.

Upgrading a standalone version of SureCall – Macintosh

000	Agilent SureCall 3.0.1.5
	Data Download Option
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Installing Install Complete 	By default, SureCall will download and install the required reference data from Agilent's cloud storage immediately after program installation is complete. If you wish to install the data from local storage, enter the location below. Provide Data Location Restore Default Choose
InstallAnywhere	Previous

Figure 75 Data Download Option screen – Macintosh

15 By default, SureCall will download and install the required reference and annotation data from Agilent Cloud storage immediately after you complete SureCall installation. If you prefer for SureCall to download and install the required data from a local storage folder or a storage folder saved to an external USB drive, enter the file path of that folder in the Provide Data Location field. You can type the file path directly into the field or click **Choose** to browse to the storage folder.

Leave the Provide Data Location field blank if you want SureCall to download the required data from Agilent Cloud storage.

NOTE If you received an external USB drive from Agilent containing the reference and annotation data, plug in the USB drive to your computer and enter the file path of the drive into the Provide Data Location field.

16 Click Next.

The Choose Install Folder screen opens.

Upgrading a standalone version of SureCall – Macintosh

000	Agilent SureCall 3.0.1.5
	Choose Install Folder
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Installing Install Complete 	Choose the folder where SureCall will be installed. Program Location inside "Agilent_SureCall_3.0.1.5" in the folder "Agilent" on the disk "Macintosh HD" Restore Default Folder Choose
Cancel	Previous Next

Figure 76 Choose Install Folder screen – Macintosh

- 17 By default, the program is installed in the Agilent SureCall Edition 3.0.XX folder (where XX is the revision number) in the Agilent folder on the Macintosh HD disk. Leave the default folder in place, or click Choose to select a new location where you want to install the SureCall program folder. Within this folder, one folder is created for the server software and one folder is created for the client software.
- 18 Click Next.

The Choose Alias Folder screen opens.

Upgrading a standalone version of SureCall – Macintosh

000	Agilent SureCall 3.0.1.5	
		Choose Alias Folder
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Installing Install Complete 	Select locations for aliases In the Dock On the Desktop In your home folder Other: Choose Don't create aliases	
InstallAnywhere Cancel	(Previous Next

Figure 77 Choose Alias Folder screen – Macintosh

19 By default, program icon is installed on the Desktop of your computer. To select another location for the program icon, select the desired location (In the Dock, for example) and then click Next.

The Pre-Installation Summary screen opens.

Upgrading a standalone version of SureCall – Macintosh

000	Agilent SureCall 3.0.1.5
	Pre-Installation Summary
 Introduction License Agreement Choose Install Set Get Server Details Enter Port Number Enter Domain Properties Enter Administrator Details Add SureCall Users Configure Proxy Settings Data Download Option Choose Install Folder Choose Shortcut Folder Pre-Installation Summary Installing Install Complete 	Please Review the Following Before Continuing: Product Name: Agilent SureCall Install Folder: "Agilent_SureCall_3.0.1.5" in the folder "Agilent" on the disk "Macintosh HD" Disk Space Information (for Installation Target): Required: 373.88 MegaBytes Available: -0 MegaBytes
Cancel	Previous Install

Figure 78 Pre-Installation Summary screen – Macintosh

20 Review the installation setup information. If you want to change any of the settings, click **Previous** and go back and change the settings. To start the installation, click **Install**.

The Installing Agilent SureCall Edition 3.0.XX screen opens and remains open until the installation is complete.

Upgrading a standalone version of SureCall – Macintosh



Figure 79 Installing Agilent SureCall screen – Macintosh

When the SureCall installation is complete, the Install Complete screen opens.

21 Click Done.

The Download window opens and the program begins downloading and installing the reference and annotation data from Agilent Cloud storage (or from the folder you designated in the Data Download Option screen).

Upgrading a standalone version of SureCall – Macintosh

000	Download
Downloading SureCal	l server data
Connecting to server	
3-Apr-2013 12:42:00 - St	arting Download at Wed Apr 03 12:42:00 PDT 2013
03-Apr-2013 12:42:01 - Av	vailable disk space: 676 GB
03-Apr-2013 12:42:01 - Ap	proximately 50 GB of data is being transferred from the Amazon cloud ar
03-Apr-2013 12:42:01 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.dict
03-Apr-2013 12:42:01 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.fasta.fai
03-Apr-2013 12:42:19 - Do	ownloaded: /GenomeReferences/hg19/hg19.genome
03-Apr-2013 12:43:18 - Do	ownloaded: /GenomeReferences/hg19/hg19/genes.txt
03-Apr-2013 12:47:33 - Do	ownloaded: DO_UN_COMPRESS_18@/GenomeReferences/hg19/hg19/hg19.f
03-Apr-2013 12:49:06 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.fasta.z08
03-Apr-2013 12:49:30 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.fasta.z15
03-Apr-2013 12:49:57 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.fasta.z12
03-Apr-2013 12:52:12 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.fasta.z09
03-Apr-2013 12:52:20 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.fasta.z18
03-Apr-2013 12:52:24 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.fasta.z10
03-Apr-2013 12:52:27 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.fasta.z07
03-Apr-2013 12:52:31 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.fasta.z02
03-Apr-2013 12:52:31 - Do	wnloaded: /GenomeReferences/hg19/hg19/hg19.fasta.z03
03-Apr-2013 12:52:33 - Do	ownloaded: /GenomeReferences/hg19/hg19/hg19.fasta.z04
< C	
	Clo

Figure 80 Download screen

During this process, the Download screen remains open and displays which files have been downloaded and installed. Your system needs to be connected to the internet until the process is complete.

22 When the downloads are complete, click **Close** to close the Download dialog box.

If the download fails or does not complete, you can manually download the missing files from within SureCall. See "Checking the data download" on page 93.

23 Start the SureCall program, log in, and enter your license information. See "Opening the SureCall 3.0 client software" on page 90.

Uninstalling SureCall – Macintosh

This section provides instructions on uninstalling the SureCall software. On a Macintosh computer on which a standalone copy of SureCall is installed, you can select to uninstall only the client software or both the client software and server software.

Uninstall the client and server software for SureCall

The Uninstaller program for SureCall provides an easy way to remove the SureCall client, server, and PostgreSQL programs from your computer.

CAUTION

When you completely uninstall SureCall, the database, the data contained in the database, and the reference data, including the reference genome file, are all completely removed. Do not uninstall the entire program unless you have backed up your database or no longer wish to use it.

1 Double-click the **Uninstaller** icon, located in the **Uninstall Agilent SureCall XX** folder of your program folder (where XX is the version of SureCall that you want to uninstall).

The uninstaller program starts.

- 2 Read the introductory information, and then click Next.
- **3** Read the warning information. You are cautioned not to stop the uninstaller once it has started to remove the programs. Click **Next**.

The Uninstall Options screen opens.

Uninstalling SureCall – Macintosh



Figure 81 Uninstall Options screen – Macintosh

4 Select Complete Uninstall and click Next.

A message box opens asking you to confirm that you want to uninstall the software.

- 5 In the message box, click Yes to continue.
- 6 When the uninstallation is complete, a message appears. Click **Done**.

The SureCall client program, server program and database, and PostgreSQL program were removed from your computer. Program folders and data folders (such as data output folders) created after installation are not removed.

Uninstall the SureCall client software only

The Uninstaller program for SureCall provides an easy way to remove the SureCall client program from your computer.
1 Double-click the **Uninstaller** icon, located in the **Uninstall Agilent SureCall XX** folder of your program folder (where XX is the version of SureCall that you want to uninstall).

The uninstaller program starts.

- 2 Read the introductory information, and then click Next.
- **3** Read the warning information. You are cautioned not to stop the uninstaller once it has started to remove the programs. Click **Next**.

The Uninstall Options screen opens.





4 Select Uninstall Specific Features and click Next.

The Choose Product Features screen opens.

4 Installation of SureCall 3.0 for Macintosh – Software Upgrade Instructions

Uninstalling SureCall – Macintosh

000	Uninstall Agilent SureCall 2.1.1.13
	Choose Product Features
 Introduction Uninstalling Uninstall Complete 	Check features that you want to uninstall. Unchecked features will remain installed. Server Image: Client Description SureCall client application.
InstallAnywhere	Previous

Figure 83 Choose Product Features screen – mark Client – Macintosh

5 In the Choose Product Features screen, mark **Client**. When the Client check box is selected, only the client program is removed from the computer. The client program folder and any data folders created after installation are not removed.

The Uninstall button becomes active.

CAUTION

Do not select **Server** unless you want to remove client and server software completely, including the database, from your computer.

6 Click Uninstall.

A message box opens asking you to confirm that you want to uninstall the client software.

- 7 In the message box, click **Yes** to continue.
- **8** When the uninstallation has completed, click **Done**.



NOTE

Installation of Sequence Alignment Tools

Installing Sequence Alignment Tools 112 Step 1. Download the GenAligners installer from the Agilent website 112 Step 2. Install the alignment tools on your computer 112

This chapter shows you how to install the sequence alignment tools provided by Agilent for use with SureCall 3.0.

If you already have the sequence alignment tools installed, verify that you have the most recent version. If necessary, uninstall the current version before downloading and installing the latest version.

To check the version number, open the installation folder (default installation folder is C:\Program Files\GenAligners), then open the file *version.txt*.



Installing Sequence Alignment Tools

Installing Sequence Alignment Tools

	In order to use SureCall to analyze unaligned sequencing files, you must download and install the compatible alignment tools provided by Agilent. SureCall uses the Burrows-Wheeler aligner (BWA) for alignment of Illumina data (Illumina GA, HiSeq, and MiSeq).
NOTE	As of version 3.0, SureCall does not support alignment of Ion Torrent sequencing data. Consequently, the GenAligners application no longer includes the TMAP aligner.
	To analyze Ion Torrent data in SureCall, align the FASTQ files in Torrent Server then use the BAM files in the SureCall analysis.
	This section provides instructions for downloading and installing the alignment tools.
NOTE	If you are upgrading the sequence alignment tools from an earlier version, uninstall the previous version of the GenAligners application from the Windows Control Panel (or, on a Macintosh computer, simply delete the application). If you cannot find the utility for uninstalling, search for "uninstall a program" within the Control Panel search field. Once the previous version has been uninstalled, download and install the latest version of the sequence alignment tools using the instructions in this chapter.

Step 1. Download the GenAligners installer from the Agilent website

- 1 Go to <u>http://www.agilent.com/genomics/surecall_soft</u>.
- 2 Click Download Software.
- **3** Download the Sequence Aligner software (Windows or Macintosh), saving the file to your computer.

Step 2. Install the alignment tools on your computer

- **1** Open the folder where you saved the GenAligners installer.
- **2** Double-click the GenAligners installer icon.

The GenAligners Setup wizard opens to the Welcome screen.



Figure 84 GenAligners Setup - Welcome screen

3 Click Next.

The End-User License Agreement window opens.

Installing Sequence Alignment Tools

😸 GenAligners Setup			
End-User License Agreement Please read the following license agreement carefully			
AGILENT TECHNOLOGIES INC. SURECALL SOFTWARE LICENSE			
ATTENTION: DOWNLOADING, COPYING, PUBLICLY DISTRIBUTING, OR USING THIS SOFTWARE IS SUBJECT TO THE AGREEMENT SET FORTH BELOW. TO DOWNLOAD, STORE, INSTALL, OR RUN THE SOFTWARE, YOU			
MUST FIRST AGREE TO AGILENT'S SOFTWARE LICENSE AGREEMENT BELOW. IF YOU HAVE READ, UNDERSTAND AND AGREE TO BE BOUND BY THE SOFTWARE LICENSE AGREEMENT BELOW, YOU ~			
$\ensuremath{\overline{\ensuremath{\mathbb V}}}$ I accept the terms in the License Agreement			
Print Back Next Cancel			

Figure 85 GenAligners Setup - End-User License Agreement screen

4 Mark the check box next to I accept the term in the License Agreement. Click Next.

The Destination Folder window opens.

Installing Sequence Alignment Tools

😸 GenAligners Setup	- • 💌
Destination Folder Click Next to install to the default folder or click Change to choose another.	
Install GenAligners to:	
C:\Program Files\GenAligners\	
Change	
Back Next	Cancel

Figure 86 GenAligners Setup - Destination Folder screen

5 By default, the alignment tools are installed in C:\ProgramFiles\GenAligners. If you prefer to install the program in a

different location, enter the file path of the desired folder into the provided field. You can type the file path directly into the field or click **Change** to browse to the desired folder.

If you want to install SureCall in the default location, leave the default file path in the field.

6 Click Next.

The Ready to Install window opens.

Installing Sequence Alignment Tools



Figure 87 GenAligners Setup - Ready to Install screen

7 Click Install.

The Installing GenAligners screen opens and remains open until the installation is complete.

Installing Sequence Alignment Tools

1	GenAligners Setup			- • ×
	Installing GenAligners			
	Please wait while the Setup Wizard installs Ge	nAligners.		
	Status:			
	[Back	Next	Cancel

Figure 88 GenAligners Setup - Installing GenAligners screen

When the installation is complete, the Completed the GenAligners Setup Wizard screen opens.

Installing Sequence Alignment Tools

😸 GenAligners Setup	
Ð	Completed the GenAligners Setup Wizard
	Click the Finish button to exit the Setup Wizard.
	Back Finish Cancel



8 Click Finish to close the wizard.

NOTE

Agilent recommends restarting your computer after installation of the sequence alignment tools is complete. SureCall will automatically connect to the alignment tools when you restart the program.

Installation of Sequence Alignment Tools 5 Installing Sequence Alignment Tools

www.agilent.com

In this book

This book gives you instructions for installing SureCall 3.0.

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